# COVER SHEET FOR AMENDMENT OF POST-TRAVEL SUBMISSION

Date/Time Stamp

RECEIVED

SECRETARY OF THE SENATE

2019 NOV 14 AM 10: 37

Instructions: Use this form as a cover sheet for any paperwork you may need to submit to the Office of Public Records in order to make your Privately Sponsored Post-Travel Submission complete in accordance with Rule 35. Only complete this form if you need to submit an amendment to a post-travel filing you have already submitted.

SUBMIT DIRECTLY TO THE OFFICE OF PUBLIC RECORDS IN 232 HART BUILDING

Name of Traveler: Mandler Shilld 5
Employing Office/Committee: Sen ator fimard she by
Travel Expenses Paid by (List all sources): The Hentage Fundation
Travel Date(s):
Description/Title of Attached Forms: EMPGING LEADING CONFERENCE
trip in Baitimore, Mor Sponsored by the Heritage Fondation. Forms are regarding the privately
Fondation. Forms are regarding the privately
sponsored traves
Purpose of Amendment (describe the reason for amending original submission): AMENDED FE2
transportation expenses, as I drove my cor and
paid for valet. Emailed correspondence attached
regarding my repayment from the Heitage
Pandahon
11/14/2019 fraidly min
(Date) (Signature of Traveler)

PAT ROBERTS, KANSAS JAMES E. RISCH, IDAHO BRIAN SCHATZ, HAWAII JEANNE SHAHEEN, NEW HAMPSHIRE

DEBORAH SUE MAYER, CHIEF COUNSEL AND STAFF DIRECTOR CAMI MORRISON, CHIEF CLERK

TELEPHONE: (202) 224-2981 FACSIMILE: (202) 224-7416 TDD: (202) 228-3752

### United States Senate

SELECT COMMITTEE ON ETHICS

October 7, 2019

Chandler Shields
Office of Senator Richard C. Shelby
United States Senate
Washington, DC 20510

Dear Mr. Shields:

This responds to your recent correspondence concerning an invitation you received to travel to the 2019 Emerging Leaders Conference, in Baltimore, Maryland, on October 9–11, 2019, sponsored by The Heritage Foundation. The Heritage Foundation certified to the Select Committee on Ethics (the Committee) that it will pay the necessary expenses<sup>1</sup> related to the travel and that it is neither a lobbyist, lobbying firm, agent of a foreign principal, or otherwise acting as a representative or agent of a foreign government. The Heritage Foundation has also certified that it does not retain or employ a registered lobbyist or agent of a foreign principal and that no registered lobbyist or agent of a foreign principal will accompany you at any point throughout your trip.<sup>2</sup>

Based on information and materials available to the Committee, and assuming the actual travel and travel-related expenses conform to the information and materials you provided, it appears that the proposed payment or reimbursement of necessary expenses for this trip may be accepted under relevant Senate Rules and the Committee's Regulations and Guidelines for Privately-Sponsored Travel, so long as at the time of the payment or reimbursement, The Heritage Foundation is neither a registered lobbyist or lobbying firm under the Lobbying Disclosure Act of 1995, or an agent of a foreign principal under the Foreign Agents Registration Act (and is not otherwise acting as a representative or agent of a foreign government), and provided the travel and all required documents are disclosed to the Secretary of the Senate in accordance with the provisions of Senate Rules 34 and 35.

Under Senate Rule 35, Senate staff must receive advance authorization signed by the Member or officer under whose direct supervision the individual works in order to accept payment or reimbursement for necessary expenses related to fact-finding travel. Further, such authorization and expenses must be disclosed to the Secretary of the Senate by filing the completed Employee Pre-Travel Authorization and the Employee Post-Travel Disclosure of Travel Expenses (Form RE-1 and Form RE-2), along with a copy of the Private Sponsor Travel Certification Form, and all relevant attachments (e.g., the private sponsor's invitation and itinerary) within 30 days of the conclusion of Privately-Sponsored Travel.

<sup>&</sup>lt;sup>1</sup> The term "necessary expenses" has a specific definition. See Select Committee on Ethics' Regulations and Guidelines for Privately-Sponsored Travel – Glossary of Terms at 8.

<sup>&</sup>lt;sup>2</sup> The term "any point throughout your trip" has a specific definition. See id. at 2.

Finally, Senate Rule 34 requires a reporting individual,<sup>3</sup> on his or her Financial Disclosure Report, to make an annual disclosure of the receipt of payments or reimbursements under Senate Rule 35 from a private sponsor for officially-related travel expenses where, in the aggregate, travel expenses exceed \$390 from that sponsor during a calendar year. However, if a Member, officer, or employee properly reports the receipt of necessary expenses for such travel to the Secretary of the Senate within 30 days of the travel, as discussed above, the travel expenses need not be disclosed a second time on their Financial Disclosure Report.

I hope you find this information helpful. If you have any additional questions, please do not hesitate to contact the Committee.

Sincerely,

Deborah Sue Mayer

Chief Counsel and Staff Director

Enclosure: Travel Checklist

<sup>&</sup>lt;sup>3</sup> A reporting individual is someone whose salary equals or exceeds 120% of the basic rate of pay for GS-15 (\$127,914 for CY 2019) or is a political fund designee and is required to file Financial Disclosure Reports.

### **Employee Post-Travel Disclosure of Travel Expenses**

	Date/Time Stamp:
	_
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	<u> </u>
tr	avel expenses that have been or will
ry,	invitee list, etc.)
	· ··

_	-	this form within 30 da olic Records in 232 Har	•	
be reimbursed/paid for	me. I also certify that	t I have attached:		travel expenses that have been or wi
The <u>original</u> Employ A copy of the Priva	yee Pre-Travel Autho ite Sponsor Travel Cei	rization (Form RE-1), <u>A</u> rtification Form with all	AND attachments (itinerar	y, invitee list, etc.)
Private Sponsor(s) (list	all): The Heritage	Foundation	<del></del> .	
Travel date(s): Wedne	esday, October 9 -	- Friday, October 11	, 2019	
	er: Spouse Sing DID NOT INCRIOSTS IN EMPLOYEE	Child		SE OR DEPENDENT CHILD, ONLY
Expenses for Employe	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
☐ Good Faith Estimate   Actual Amount	\$48.00	\$304.00 + tax	\$137.00	n/a
Expenses for Accomp	Transportation Expenses	pendent Child (if application Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
☐ Good Faith Estimate ☐ Actual Amount	n/a	n/a	n/a	n/a
<del>(1)</del> (2)	of all meetings and evached agenda.	ents attended. See Senat	e Rule 35.2(c)(6). (A	Attach additional pages if
CD (Date)	•	Member/Officer:	<u>_</u> _	Mh (mild) (Signature of traveler)
			ctions with travel des	scribed in the Employee Pre-Travel

Authorization form, are necessary transportation, lodging, and related expenses as defined in Rule 35

(Signature of Supervising Senator/Officer)

(Revised 1/3/11)

### Shields, Chandler (Shelby)

Tindido, Citatiane (5	
From:	Kinney, Audra <audra.kinney@heritage.org></audra.kinney@heritage.org>
Sent:	Friday, November 8, 2019 11:18 AM
To: Subject:	Shields, Chandler (Shelby) RE: ELC Ethics Paperwork
Subject.	RE. ELC EUTICS Paperwork
Follow Up Flag:	Follow up
Flag Status:	Flagged
Thank you so much! I'm s	so excited, sad to be leaving Heritage though.
	ce to Accounting, you'll receive the reimbursement in the mail within the month. I don't need et me know if you have any questions at all!
Audra Kinney Program Associate, Congres The Heritage Foundation 214 Massachusetts Avenue, Washington, DC 20002 202-608-6058 heritage.org	
From: Shields, Chandler (	Shelby) < Chandler_Shields@shelby.senate.gov>
Sent: Friday, November 8	
To: Kinney, Audra < Audra Subject: Re: ELC Ethics Pa	
Subject. Ne. Lee cones ra	PCI WOIK
Oh how exciting! Hope	you are excited for your new opportunity. I have attached the W9 form. Do you need
copy of my updated po	·
Thanks!	
Chandler	
:o ———	
From: Kinney, Audra <	elby)
Subject: KE: ELC Etnics Pa	perwork
Hey girl yes! I'm so sorry less been a bit all over the pla	I've been so slow getting everything back to you. Next week is my last week at Heritage, I have ce!!
io Distriction of the Accounting was	tarday, and you are required to fill out a 14/ 0 in and an familia to make the bound of the contract of the
	terday, and you are required to fill out a <u>W-9</u> in order for us to reimburse you. Our Accounting ursement to the address you list on the form. For the post travel form, you just need to fill in
	blank that asks for the transportation cost.

Let me know if I can answer any additional questions!

### **Employee Post-Travel Disclosure of Travel Expenses**

Post-Travel Filing Instructions: Complete this form within 30 days of returning from travel. Submit all forms to the Office of Public Records in 232 Hart Building.

The <u>original</u> Empl	oyee Pre-Travel Autho	rization (Form RE-1), z rtification Form with all	AND	
			attachments (itinerar	y, invitee list, etc.)
Private Sponsor(s) (lis	t all): The Heritage	Foundation	·	
Travel date(s): Wedr	nesday, October 9	- Friday, October 11	, 2019	
Name of accompanying	ng family member (if a	ny):		
Relationship to Travel	er:   Spouse	Child		
				SE OR DEPENDENT CHILD, O
Expenses for Employ		EXPENSES. (Attach addi	tional pages if necessary	/·) 
	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
☐ Good Faith Estimate	\$0	\$304.00 + tax	\$137.00	n/a
Actual Amount				
Expenses for Accomp	<del> </del>	pendent Child (if applie	<u> </u>	
	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
☐ Good Faith Estimate	n/a	n/a	n/a	n/a
☐ Actual Amount				
Provide a description necessary.): See atta	of all meetings and evached agenda.	ents attended. See Senat	e Rule 35.2(c)(6). (A	ttach additional pages if
	Mandler	(hild(	<u></u>	100- 6:11
(Date)		ame of traveler	_ \mathready	(Signature of traveler)
	•	-		

(Revised 1/3/11)

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Form RE-1

(Revised 10/19/15)

### **EMPLOYEE PRE-TRAVEL AUTHORIZATION**

<u>Pre-Travel Filing Instructions</u>: Complete and submit this form at least 30 days prior to the travel departure date to the Select Committee on Ethics in SH-220. Incomplete and late travel submissions will <u>not</u> be considered or approved. This form <u>must</u> be typed and is available as a fillable PDF on the Committee's website at ethics.senate.gov. Retain a copy of your entire pre-travel submission for your required post-travel disclosure.

Name of Traveler:	Chandler Shields
Employing Office/Committee:	Sen. Richard Shelby
Private Sponsor(s) (list all): The He	ritage Foundation
Travel date(s): Oct. 9-11, 2019	
	ne trip for any reason you <u>must</u> notify the Committee.
Destination(s): Baltimore, MD	· <del>-</del>
Explain how this trip is specifically c	onnected to the traveler's official or representational duties:
breakout session dedicated to higher e the Appropriations process, especially	I have recently been assigned the education portfolio for Sen. Shelby. There is an entire education. Additionally, the budget simulation will be incredibly helpful in gaining a grasp on considering my boss' role as Chairman. In my official title as the Assistant to the Chief of nore legislative understanding as I currently operate in a very administrative role.
Name of accompanying family members Relationship to Employee: Spouse	
I certify that the information containe	ed in this form is true, complete and correct to the best of my knowledge:
9/24/19 (Date)	(Signature of Employee)
TO BE COMPLETED BY SUPERVISING Secretary for the Majority, Secretary for the Majority	IG SENATOR/OFFICER (President of the Senate, Secretary of the Senate, Sergeant at Arms, the Minority, and Chaplain):
Sen. Richard Shelb	y hereby authorize Chandler Shields
(Print Senator's/Officer's Na	- · · · · · · · · · · · · · · · · · · ·
related expenses for travel to the even	sion, to accept payment or reimbursement for necessary transportation, lodging, and at described above. I have determined that this travel is in connection with his or her iceholder, and will not create the appearance that he or she is using public office for
of the Senate. (signify "yes" by checking	Richard Halles
' (Date)	(Signature of Supervising Senator/Officer)



214 Massachusetts Avenue, NE Washington, DC 20002 (202) 546-4400 heritage.org

September 23, 2019

Chandler Shields
Senator Richard Shelby
304 Russell Senate Office Building 2 Constitution Avenue, NE
Washington, DC 20510-0103

Dear Chandler,

On behalf of The Heritage Foundation, I want to formally extend an invitation to The Heritage Foundation's 2019 Emerging Leaders Conference. The event will be held Wednesday, October 9 – Friday, October 11 in the Inner Harbor in Baltimore, MD.

At the Emerging Leaders Conference, attendees will discuss issues confronting the next Congress, develop their leadership skills, and sharpen their knowledge of process, rules and procedure. An educational experience tailored to work on Capitol Hill, this conference also promises an excellent opportunity to grow your network among your colleagues and expand your impact.

All paperwork must be submitted to the Ethics Committee no later than Monday, September 9, 2019. Here is what you need to submit for this year's trip:

- 1. Register with Heritage at <a href="https://events.heritage.org/Leaders2019">https://events.heritage.org/Leaders2019</a>
- 2. Submit the attached packet to the Ethics Committee
- 3. Fill out and submit the Employee Pre-Travel Authorization to the Ethics Committee

Emerging Leaders will be held during a recess week for both House and Senate staff. Heritage will provide transportation, overnight accommodations, and meals throughout the retreat.

The agenda (included in the attached in the Ethics Packet) is subject to change, but we will regularly update any changes on the website for your reference.

Please let me know if you have any questions, looking forward to having you with us this year.

Sincerely,

Thomas Binion

Vice President, Government Relations

The Heritage Foundation

### PRIVATE SPONSOR TRAVEL CERTIFICATION FORM

This form must be completed by any private entity offering to provide travel or reimbursement for travel to Senate Members, officers, or employees (Senate Rule 35, clause 2). Each sponsor of a fact-finding trip must sign the completed form. The trip sponsor(s) must provide a copy of the completed form to each invited Senate traveler, who will then forward it to the Ethics Committee with any other required materials. The trip sponsor(s) should **NOT** submit the form directly to the Ethics Committee. Please consult the accompanying instructions for more detailed definitions and other key information.

The Senate Member, officer, or employee MUST also provide a copy of this form, along with the appropriate travel authorization and reimbursement form, to the Office of Public Records (OPR), Room 232 of the Hart Building, within thirty (30) days after the travel is completed.

υp.	onsor(s) of the trip (please list all sponsors): The Heritage Foundation
	scription of the trip: Three-day educational conference to teach Congressional staff leadership and licy skills.
— Da	tes of travel: Wednesday, October 9, 2019 - Friday, October 11, 2019
	ce of travel: Baltimore, MD
Na	me and title of Senate invitees: See Attached
l ce	ertify that the trip fits one of the following categories:
X	(A) The sponsor(s) are not registered lobbyists or agents of a foreign principal <u>and</u> do not retain or employ registered lobbyists or agents of a foreign principal <u>and</u> no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee at any point throughout the trip.  - OR -
	(B) The sponsor or sponsors are not registered lobbyists or agents of a foreign principal, but retain or employ one or more registered lobbyists or agents of a foreign principal and the trip meets the requirements of Senate Rule 35.2(a)(2)(A)(i) or (ii) (see question 9).
X	I certify that the trip will not be financed in any part by a registered lobbyist or agent of a foreign principal.
_	-AND-
×	I certify that the sponsor or sponsors will not accept funds or in-kind contributions earmarked directly or indirectly for the purpose of financing this specific trip from a registered lobbyist or agent of a foreign principal or from a private entity that retains or employs one or more registered lobbyists or agents of a foreign principal.
l ce	rtify that:
X	The trip will not in any part be planned, organized, requested, or arranged by a registered lobbyist or agent of a foreign principal except for <i>de minimis</i> lobbyist involvement.  - AND -
X	The traveler will not be accompanied on the trip by a registered lobbyist or agent of a foreign principal except as provided for by Committee regulations relating to lobbyist accompaniment (see question 9).

9.	USE ONLY IF YOU CHECKED QUESTION 6(B)  I certify that if the sponsor or sponsors retain or employ one or more registered lobbyists or agents of a foreign principal, one of the following scenarios applies:
	<ul> <li>(A) The trip is for attendance or participation in a one-day event (exclusive of travel time and one overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee on any segment of the trip.</li> <li>OR -</li> </ul>
	<ul> <li>(B) The trip is for attendance or participation in a one-day event (exclusive of travel time and two overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee on any segment of the trip (see questions 6 and 10).         <ul> <li>− OR −</li> </ul> </li> </ul>
	(C) The trip is being sponsored only by an organization or organizations designated under § 501(c)(3) of the Internal Revenue Code of 1986 and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee at any point throughout the trip.
10.	USE ONLY IF YOU CHECKED QUESTION 9(B)  If the trip includes two overnight stays, please explain why the second night is practically required for Senate invitees to participate in the travel:
11.	An itinerary for the trip is attached to this form. I certify that the attached itinerary is a detailed (hourby-hour), complete, and final itinerary for the trip.
12.	Briefly describe the role of each sponsor in organizing and conducting the trip:
	The Heritage Foundation is the sole sponsor of the trip and is solely responsible for its execution.
13.	Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to that mission:
	The Heritage Foundation is a research and educational institution whose mission is to formulate and
	promote conservative public policies. This conference is part of that educational mission.
	<del></del>
14.	Briefly describe each sponsor's prior history of sponsoring congressional trips:
	The Heritage Foundation hosted similar conferences in 2016, 2017, and 2018. Additionally, Heritage
	hosted numerous staff-level conferences connected to educational fellowships, as well as an annual
	member-level conference for members of the House of Representatives.

The Heritage Founda	ation hosts around 400 e	vents on Capitol Hill	l each year. These i	nclude educationa		
fellowships, topical b	riefings, and policy worki	ng groups.				
Total Expenses for Ea	otal Expenses for Each Participant:					
	Transportation Expenses	Lodging Expenses	Meai Expenses	Other Expenses		
Good Faith estimate  Actual	\$20.63	\$304.00	\$177.50	\$12.00 (Educational to of the USCG Taney)		
	rip involves an event that		~	_		
participation or b) the congressional particip	e trip involves an event th	nat is arranged or or	ganized specifically	_		
participation or b) the congressional particip	e trip involves an event the pation:	nat is arranged or or	ganized specifically	<del>-</del>		
participation or b) the congressional participartic	e trip involves an event the pation:	congressional part	ganized specifically	_		
participation or b) the congressional participation.  This trip is arranged selecting to the congression for selecting to the congression of the c	e trip involves an event the pation: specifically with regard to	congressional part	ganized specifically	with regard to		
participation or b) the congressional particip. This trip is arranged season for selecting to Baltimore, MD is easi	e trip involves an event the pation: specifically with regard to the location of the event of	congressional part	ganized specifically	with regard to		
participation or b) the congressional particip. This trip is arranged season for selecting to Baltimore, MD is easi	e trip involves an event the sation: specifically with regard to the location of the event of the event of the accessible from Wash	congressional part	ganized specifically	with regard to		
participation or b) the congressional particip. This trip is arranged season for selecting to Baltimore, MD is easifocus on the education.	e trip involves an event the sation: specifically with regard to the location of the event of the event of the accessible from Wash	congressional part	ganized specifically	with regard to		
participation or b) the congressional particip. This trip is arranged season for selecting to Baltimore, MD is easifocus on the education.	trip involves an event the pation: specifically with regard to the location of the event of the event of the trip. Thotel or other lodging factors	congressional part	ganized specifically	with regard to		
participation or b) the congressional particip. This trip is arranged season for selecting to Baltimore, MD is easing the cours on the education. Name and location of	the location of the event of the location of the event of the location of the event of the trip.  Thotal or other lodging factor Court	congressional part	ganized specifically	with regard to		
Participation or b) the congressional participation. This trip is arranged season for selecting to Baltimore, MD is easifocus on the education. Name and location of Royal Sonesta Harbotton St. Baltimore.	the location of the event of the location of the event of the location of the event of the trip.  Thotal or other lodging factor Court	congressional part	ganized specifically	with regard to		

	Describe how the daily expenses for lodging, meals, and other expenses provided to trip participants compares to the maximum per diem rates for official Federal Government travel:
	The lodging expenses are equal to the federal per diem rate for Baltimore, MD.
	The meal expenses are below the federal per diem rate for Baltimore, MD.
	Describe the type and class of transportation being provided. Indicate whether coach, business-class or first class transportation will be provided. If first-class fare is being provided, please explain why first-class travel is necessary:
	Attendees will travel in a coach charter bus.
	I represent that the travel expenses that will be paid for or reimbursed to Senate invitees do not include expenditures for recreational activities, alcohol, or entertainment (other than entertainment provided to all attendees as an integral part of the event, as permissible under Senate Rule 35).  List any entertainment that will be provided to, paid for, or reimbursed to Senate invitees and explain why the entertainment is an integral part of the event:
	None.
	I hereby certify that the information contained herein is true, complete and correct. (For trips involving more than one sponsor, you must include a completed signature page for each additional sponsor):  Signature of Travel Sponsor:
	Name and Title: Thomas Binion, Vice President, Government Relations
	Name of Organization: The Heritage Foundation
	Address: 214 Massachusetts Ave NE, Washington, DC 20002
	Telephone Number: 202-608-6188
•	Telephone Number: 202-608-6188  Fax Number: n/a



### Emerging Leaders Conference 2019

Wednesday, October 9 – Friday, October 11, 2019 Royal Sonesta Harbor Court | Baltimore, MD

### **AGENDA**

### WEDNESDAY, OCTOBER 9, 2019

1:00 p.m. - 1:30 p.m.

**ATTENDEE CHECK-IN** 

The Heritage Foundation

1:45 p.m.

ATTENDEES BOARD THE BUS

2:00 p.m.

BUSES DEPART TO ROYAL SONESTA HARBOR COURT

Attendees leave luggage at the bus after check-in

3:15 p.m.

**BUSES ARRIVE AT ROYAL SONESTA HARBOR COURT** 

3:30-5:30 p.m.

REGISTRATION

Attendees check-in to overnight rooms

5:30 - 6:30 p.m.

WELCOME RECEPTION AND OVERVIEW

Participants will gather for the first time as a group to hear brief welcome remarks. These remarks will include the purpose of the conference, a review of the agenda, and an opportunity for participants to ask any questions about logistics.

Tommy Binion

Vice President, Government Relations

The Heritage Foundation

6:30 - 8:30 p.m.

**OPENING DINNER AND KEYNOTE ADDRESS** 

LESSONS ON SERVANT LEADERSHIP

Servant leadership is critical in leading effective teams and living a life of purpose. Through experiences in the NFL, House of Representatives, and now at his own veterans' aid charity, Yellow Ribbons United, Derrick Dockery has led a life that exemplifies servant leadership. Dockery will discuss what it means to be a servant leader and how to use ones talents effectively to give back to their community and live a purposeful life for others.

Derrick Dockery

Co-Founder, Yellow Ribbons United

Former Business & Intergovernmental Coalitions Director, Office of Speaker Paul Ryan

Former Offensive Lineman, National Football League

### THURSDAY, OCTOBER 10, 2019

9:00-10:15 a.m.

Breakfast Address and Emerging Issue #1

TECHNOLOGY & THE FUTURE OF U.S. NATIONAL SECURITY

Technology is a defining variable in the American national security calculus. These tools are not only how modern warfare is fought, but they are increasingly the battlefield itself. How does the United States navigate the tensions between free-market economics and the existential challenge of preventing Chinese cyber-enabled espionage? What are the responsibilities of US companies who are the bleeding-edge of technology innovation in an international system that sees these innovations as offering decisive advantage? In short: how can the United States thrive in an era of technological great power competition?

Klon Kitchen

Senior Research Fellow, Technology, National Security, and Science Policy The Heritage Foundation

10:15 - 10:30 a.m. BREAK

10:30 a.m. - 12:00 p.m. BUDGET SIMULATION & BREAKOUT DISCUSSION

Conference participants will participate in a budget simulation game whereby they are divided into teams and tasked with reaching a budget deal and passing a budget resolution for the upcoming fiscal year. Each participant will draw a card from a stack, and each card will detail the team, role, and individual objectives of that participant. Participants will divide into teams, where they will hear from a Heritage expert, or 'Counsel', on the budget process and their respective teams' role in that process. Each team will also elect a participant to serve as 'leadership' for that team. Leadership conducts negotiations and speaks on behalf of the team before a large group.

Participants will conduct negotiations within and between teams, attempting to reach a deal despite the conflicting interests of each individual and party. There will be time to negotiate and whip votes between policy sessions and outside of the designated budget simulation sessions. The budget resolution will include the total funding for discretionary spending (302a allocation), the topline numbers for each individual appropriations bill (302b allocations), and policy riders. On the final morning of the trip, participants will vote on the budget resolution. It will pass with a simple majority, and participants cannot filibuster.

Tommy Binion
Vice President, Government Relations
The Heritage Foundation

12:00 – 12:15 p.m. **BREAK** 

12:15 – 2:00 p.m. LUNCHEON AND KEYNOTE ADDRESS:

TWITTER-CRAFT: COMMUNICATIONS IN THE DIGITAL AGE

The media has changed the way the public learns issues, understands concepts, forms opinions, and spreads ideas, making effective communication vital in today's increasingly social and digital environment. What are the most effective ways to communicate? How does this change based on the issue being discussed?

Carrie Severino

Chief Counsel & Policy Director

Judicial Crisis Network

Rob Bluey

Vice President, Communications, The Heritage Foundation

Executive Editor, the Daily Signal

2:00-3:00 p.m. BREAK

3:00-4:00 p.m. EMERGING ISSUE #2:

THE FREE MARKET & THE FAMILY

The driving fuel behind the strength of American families is the free enterprise system. The free market naturally and ceaselessly excels in creating opportunities and prosperity for families in ways that empower them. Government 'family support' programs, on which we spend \$1.2 trillion per year, are inherently inefficient, one-size-fits all, and constantly having to adjust and expand in attempt to meet families' needs.

Rachel Greszler

Research Fellow in Economics, Budget, and Entitlements
The Heritage Foundation

Clarence Carter

Director of the Office of Family Assistance

Acting Director of the Office of Community Services, Administration for Children & Families Department of Health & Human Services

Joel Griffith

Research Fellow, Financial Regulations
The Heritage Foundation

4:00 - 4:15 p.m.

**BREAK** 

4:15 – 5:15 p.m.

### **EMERGING ISSUE #3:**

### REFRAMING THE FUTURE OF HIGHER EDUCATION

Today's higher education system is in crisis. American students are \$1.6 trillion in student loan debt, the majority of students will not finish college in four years, and many drop out without a degree and struggling to pay off debt. Unfortunately, policies from Washington make these problems worse. While many claim that "free" college is the answer, this will only shift the present problems with higher education onto American taxpayers. Only by encouraging competition and innovation in the higher education sector, and reducing funds coming from Washington, can we see true improvements for students and taxpayers.

Mike Howell

Executive Branch Advisor, Government Relations
The Heritage Foundation

Angela Sailor

Vice President, Feulner Institute
The Heritage Foundation

Mary Clare Amselem

Policy Analyst, Center for Education Policy

The Heritage Foundation

5:15-5:30 p.m.

#### REACH A BUDGET DEAL

Participants will reach a deal by this time in the trip. The Leader will read the budget resolution aloud to the body.

5:30-6:30 p.m.

RECEPTION

6:30 - 8:30 p.m.

## DINNER AND KEYNOTE ADDRESS: LEADERSHIP LESSONS FROM THE THUNDERBIRDS

Effective leaders seek to build commitment, trust, and loyalty with their teammates, whether that is in the field or in the workplace. JV Venable discusses lessons learned from serving for 25 years in the US Air Force. JV, who served as Commander of the celebrated Thunderbirds, also authored a book on leading high performance teams.

John "JV" Venable Col. USAF (ret.)

Former Commander, USAF Thunderbirds Senior Research Fellow for Defense Policy

The Heritage Foundation

### FRIDAY, OCTOBER 11, 2019

8:30 a.m. (or after) Luggage Drop-off

Attendees leave their luggage at the Heritage luggage check

9:00 - 10:15 a.m. Breakfast Address & Emerging Issue #4:

WHAT AMERICANS WANT IN HEALTH CARE

Healthcare has become one of the defining issues of our current debate. Now more than ever, policy proposals such as single-payer universal care, eliminating public options, and privatized care, are drastically different from one another and from the status quo. This panel will review the current state of America's healthcare system and discuss solutions that have been prescribed to fix many of the problems arising from this system, ultimately addressing the question: What do Americans really want in health care?

Tara O'Neill Hayes

Deputy Director of Health Care Policy

American Action Forum

Nina Schaefer

Senior Research Fellow, Health Policy

The Heritage Foundation

Matt Eagan

Program Associate, Congressional Relations

The Heritage Foundation

10:15 – 10:30 a.m. **BREAK** 

10:30 - 10:45 a.m. FINAL VOTES

Participants will vote on the budget resolution.

10:45 – 11:00 a.m. **LOAD BUS** 

11:00 - 11:15 a.m. WALK TO USCGC TANEY

11:15 a.m. – 1:00 p.m. TOUR & DISCUSSION AT USCGC TANEY

The United States Coast Guard Cutter Taney is the last warship still afloat that fought in the attack on Pearl Harbor. The USCGC Taney offers tours of the vessel, after which participants will learn about the historical and military context of the attack on Pearl Harbor in relation to

military readiness today.

Dakota Wood
LtCol USMC (ret.)

Research Fellow, Defense Programs

The Heritage Foundation

1:00 p.m. – 1:15 p.m. **CLOSING REMARKS** 

Tommy thanks participants for attending this year's conference.

**Tommy Binion** 

Vice President, Government Relations

The Heritage Foundation

1:15 p.m. Conference Concludes

Attendees board buses; boxed lunches provided on board

1:15 p.m. Bus departs

2:30 p.m. Bus arrives at The Heritage Foundation



### **Emerging Leaders Conference 2019**

Wednesday, October 9 – Friday, October 11, 2019 Royal Sonesta Harbor Court | Baltimore, MD

### **INVITATION LIST**

### **About the List:**

The following individuals were extended an invitation to The Heritage Foundation's 2019 Emerging Leaders Conference due to their interest in conservative policy.

Last Name	First Name	Office	Chamber
Anderson	Alyssa	Rep. Tom Emmer	House
Andrade	Вагвага	Rep. Rob Bishop	House
Andzel	Christian	Rep. Chip Roy	House
Ath	Viraktep	Sen. Steve Daines	Senate
Ball	Luke	Rep. Matt Gaetz	House
Bardin	Erin	Sen. James Risch	Senate
Barton	Carter	Rep. Virginia Foxx	House
Bennett	Parker	Rep. Mike Kelly	House
Bensur	Will	Rep. John Katko	House
Besonen	Mark	Rep. Virginia Foxx	House
Boyd	Stephen	Sen. James Lankford	Senate
Bradley	Philippa	Rep. David McKinley	House
Brereton	Charlie	Senate HELP Committee	Senate
Brookhart	Mindy	Sen. John Hoeven	Senate
Brown	Matt	Rep. Bryan Steil	House
Butherus	Daniel	Rep. Ken Buck	House
Caddock	John	Rep. Alex Mooney	House
Campbell	Kyle	Rep. Tom McClintock	House
Caplin	Sarah	Sen. Mike Lee	Senate
Carrier	Adrienne	Sen. Mike Braun	Senate

Case	Michael	Rep. Andy Barr	House
Chelak	Christian	Sen. Pat Toomey	Senate
Cicchella	Jamie	Rep. Ted Yoho	House
Clark .	Annie	Rep. Debbie Lesko	House
Clement	Dylan	Sen. Pat Toomey	Senate
Coffman	Sarah	Rep. James Comer	House
Connolly	Briana	Sen. Pat Toomey	Senate
Cooke	MaryLou	Rep. David Rouzer	House
Correll	Charles	Rep. Kevin McCarthy	House
Craddock	Reed	Rep. Trent Kelly	House
Craig	Halie	Sen. Pat Toomey	Senate
Davern	Katie	Sen. Mike Lee	Senate
Decker	Brad	Rep. Mo Brooks	House
DeFilippo	Katarina	Rep. Ron Estes	House
Dever	Tyler	Rep. Ross Spano	House
Dews	Elizabeth	Rep. Ted Budd	House
DiPalma	Mason	Rep. Mike Turner	House
Dobbins	Halee	Rep. Jim Banks	House
Dolan	Thomas	Rep. Neal Dunn	House
Douthitt	Lily	Rep. James Comer	House
Duncan	Josh	Sen. Marco Rubio	Senate
Eberle	Jonathan	Rep. Andy Biggs	House
Enlow	Alex	Rep. Trent Kelly	House
Ensslin	Corey	Sen. Pat Toomey	Senate
Erikson	Mercedes	Sen. Jim Risch	Senate
Florian Sainz	Jocelynne	Sen. Jim Risch	Senate
Fuentes	Jose	Rep. Ken Calvert	House
Gates	Zach	Rep. Ann Wagner	House
Gilbert	Sarah	Rep. George Holding	House
Gillespie	Lauren	Rep. Ted Yoho	House
Gilsdorf	Andrea	Sen. Ben Sasse	Senate
Glasgow	Savannah	Rep. Gus Bilirakis	House
Graff	Jessica	Rep. Larry Buschon	House

Green	Alexa	Sen. Jim Risch	Senate
Hadden	Emily	Rep. Neal Dunn	House
Handy	Bridget	House Ed and Labor	House
Harkins	Wesley	Rep. Doug Lamborn	House
Но	Andy	Sen. Mike Lee	Senate
Hoffman	Austin	Rep. Mark Meadows	House
Holland	Peter	Rep. Matt Gaetz	House
Iwaskiw	Jonathan	Sen. Ted Cruz	Senate
Joenler	Simon	Rep. Ralph Norman	House
Johnson	Crystal	Rep. John Ratcliffe	House
Jones	Dylan	Rep. Steve Watkins	House
Kaye	Charlotte	Sen. David Perdue	Senate
Kelly	Hunter	Sen. Josh Hawley	Senate
Kim- Hummel	Justin	Rep. Greg Steube	House
King	Wells	Sen. Mike Lee	Senate
Kujanpaa	Erik	Sen. Mike Lee	Senate
Lane	Will	Rep. Jeff Duncan	House
Laven	Zack	Rep. David Schweikert	House
Lefaive	Erica	Rep. Randy Weber	House
Lenz	Catherine	Rep. Tom Emmer	House
Lewis	Katherine	Rep. Devin Nunes	House
Lindow	Michaila	Rep. Mo Brooks	House
Lingg	Angela	Sen. John Kennedy	Senate
Lopez	Janessa	Rep. Ken Buck	House
Lucchese	Michael	Sen. Ben Sasse	Senate
MacDonald	Liam	Rep. David Roe	House
Macheledt	Marshall	Rep. Jim Jordan	House
Marvel	Toby	Rep. Jim Baird	House
McAndrews	Sean	Rep. Mark Meadows	House
McBride	Erin	Rep. David Rouzer	House
McCoullough	Tom	Rep. Bill Posey	House
McFadyen	Trent	Sen. Mitt Romney	Senate

McKay	Elizabeth	Sen. Johnny Isakson	Senate
McReynolds	Allyson	Rep. Ken Calvert	House
Melbye	Linnea	Rep. Pete Stauber	House
Menon	Vijay	Joint Economic Committee	Senate
Meyer	Theresa	Rep. Tom Emmer	House
Morgan	Kate	Rep. Mark Meadows	House
Morley	Andrew	Rep. Pete Stauber	House
Muscolini	John	House Appropriations Committee	House
Nail	Sarah Hope	Rep. Michael Cloud	House
Neumeyer	Ayla	Sen. Jim Risch	Senate
Nice	Janet	Sen. Pat Toomey	Senate
Nista	Julia	Rep. Andy Harris	House
O'Connor	Alex	Senate Small Business	Senate
Ordway	Robert	Sen. Mike Braun	Senate
Osborn	Claire	Rep. Andy Barr	House
Padgett	Ashleigh	Rep. Barry Loudermilk	House
Pakledinaz	Adam	Rep. Daniel Webster	House
Pascoe	Caleb	Senate Small Business	Senate
Pearce	Meghan	Sen. Pat Toomey	Senate
Pereira	Danuta	Sen. Ron Johnson	Senate
Pierre	Nathan	Sen. Mike Braun	Senate
Posner	Ilan	Sen. Ben Sasse	Senate
Proffitt	Gavin	Republican Study Committee	House
Pryor	Victoria	Sen. David Perdue	Senate
Pucciarelli	Joseph	Rep. Rob Woodall	House
Raper	Sarah	Rep. Steve Womack	House
Reasor	Christiana	Rep. Steve Watkins	House
Reeves	Danny	Rep. Glenn Thompson	House
Ringer	Chris	Rep. Jeff Duncan	House
Robertson	Whitney	Rep. Mike Johnson	House
Rockwell	Nick	Rep. Glenn Thompson	House
Rusher	Paige	Sen. Richard Burr	Senate
Russell	Chance	Rep. Phil Roe	House

Sabol	Sam	Rep. David Schweikert	House
Salmon	Diem	Senate Armed Services	Senate
Shellnutt	Makenzie	Sen. Steve Daines	Senate
Shelton	John	Rep. Bill Posey	House
Shields	Chandler	Sen. Richard Shelby	Senate
Shumate	Samuel	Rep. Ted Budd	House
Smith	Brandon	Rep. Ron Estes	House
Smith	Cameron	Rep. William Timmons	House
Smith	Heather	Rep. Debbie Lesko	House
Smith	Chandler	Rep. Ken Calvert	House
Smith	Delayne	Rep. Kevin Brady	House
Smoloski	Walter	Rep. Andy Harris	House
Sowell	Tucker	Rep. Kay Granger	House
Stebick	Elise	Sen. Mitch McConnell	Senate
Stechschulte	Alissa	Rep. Glenn Thompson	House
Stovall	Shannon	Rep. Andy Biggs	House
Strickland	Ethan	Sen. Tim Scott	Senate
Sullins	Ella	Senator Shelby	Senate
Sun	Kevin	House Republican Conference	House
Swanson	Ian	Sen. Ben Sasse	Senate
Swartz	Bryan	Sen. Jerry Moran	Senate
Tanner	Kylie	Sen. Mitt Romney	Senate
Taylor	Lydia	Sen. Marsha Blackburn	Senate
Teixeira	Mimi	Sen. Mike Lee	Senate
Thompson	Katherine	Sen. Mike Lee	Senate
Thompson	Jessica	Rep. Daniel Webster	House
Trejo	Travis	Rep. Andy Harris	House
Wagner	Matthues	Rep. Devin Nunes	House
Warren	Jim	Sen. Tim Scott	Senate
Wendt	Jonah	Rep. Chip Roy	House
Werner	Micki	Sen. Marsha Blackburn	Senate
West	Daniel	Rep. Jim Hagedorn	House
White	Grace	Rep. David Schweikert	House

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### **Emerging Leaders Conference 2019**

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### **AGENDA**

### WEDNESDAY, OCTOBER 9, 2019

1:00 p.m. – 1:30 p.m. ATTENDEE CHECK-IN

The Heritage Foundation

Attendees leave luggage at the bus after check-in

1:45 p.m. ATTENDEES BOARD THE BUS

2:00 p.m. BUSES DEPART TO ROYAL SONESTA HARBOR COURT

3:15 p.m. BUSES ARRIVE AT ROYAL SONESTA HARBOR COURT

3:30 - 5:30 p.m. **REGISTRATION** 

Attendees check-in to overnight rooms

5:30 – 6:30 p.m. WELCOME RECEPTION AND OVERVIEW

Participants will gather for the first time as a group to hear brief welcome remarks. These remarks will include the purpose of the conference, a review of the agenda, and an opportunity for participants to ask any questions about logistics.

**Tommy Binion** 

Vice President, Government Relations

The Heritage Foundation

6:30 – 8:30 p.m. OPENING DINNER AND KEYNOTE ADDRESS

LESSONS ON SERVANT LEADERSHIP

Servant leadership is critical in leading effective teams and living a life of purpose. Through experiences in the NFL, House of Representatives, and now at his own veterans' aid charity, Yellow Ribbons United, Derrick Dockery has led a life that exemplifies servant leadership. Dockery will discuss what it means to be a servant leader and how to use ones talents effectively to give back to their community and live a purposeful life for others.

Derrick Dockery

Co-Founder, Yellow Ribbons United

Former Business & Intergovernmental Coalitions Director, Office of Speaker Paul Ryan

Former Offensive Lineman, National Football League

### THURSDAY, OCTOBER 10, 2019

9:00 – 10:15 a.m. Breakfast Address and Emerging Issue #1

TECHNOLOGY & THE FUTURE OF U.S. NATIONAL SECURITY

Technology is a defining variable in the American national security calculus. These tools are not only how modern warfare is fought, but they are increasingly the battlefield itself. How does the United States navigate the tensions between free-market economics and the existential challenge of preventing Chinese cyber-enabled espionage? What are the responsibilities of US companies who are the bleeding-edge of technology innovation in an international system that sees these innovations as offering decisive advantage? In short: how can the United States thrive in an era of technological great power competition?

Klon Kitchen

Senior Research Fellow, Technology, National Security, and Science Policy The Heritage Foundation

10:15 - 10:30 a.m. BREAK

10:30 a.m. – 12:00 p.m. BUDGET SIMULATION & BREAKOUT DISCUSSION

Conference participants will participate in a budget simulation game whereby they are divided into teams and tasked with reaching a budget deal and passing a budget resolution for the upcoming fiscal year. Each participant will draw a card from a stack, and each card will detail the team, role, and individual objectives of that participant. Participants will divide into teams, where they will hear from a Heritage expert, or 'Counsel', on the budget process and their respective teams' role in that process. Each team will also elect a participant to serve as 'leadership' for that team. Leadership conducts negotiations and speaks on behalf of the team before a large group.

Participants will conduct negotiations within and between teams, attempting to reach a deal despite the conflicting interests of each individual and party. There will be time to negotiate and whip votes between policy sessions and outside of the designated budget simulation sessions. The budget resolution will include the total funding for discretionary spending (302a allocation), the topline numbers for each individual appropriations bill (302b allocations), and policy riders. On the final morning of the trip, participants will vote on the budget resolution. It will pass with a simple majority, and participants cannot filibuster.

Tommy Binion
Vice President, Government Relations
The Heritage Foundation

12:00 – 12:15 p.m. **Break** 

12:15 – 2:00 p.m. LUNCHEON AND KEYNOTE ADDRESS:

TWITTER-CRAFT: COMMUNICATIONS IN THE DIGITAL AGE

The media has changed the way the public learns issues, understands concepts, forms opinions, and spreads ideas, making effective communication vital in today's increasingly social and digital environment. What are the most effective ways to communicate? How does this change based on the issue being discussed?

Carrie Severino

Chief Counsel & Policy Director

Judicial Crisis Network

Rob Bluey

Vice President, Communications, The Heritage Foundation

Executive Editor, the Daily Signal

2:00-3:00 p.m. Break

3:00-4:00 p.m. EMERGING ISSUE #2:

THE FREE MARKET & THE FAMILY

The driving fuel behind the strength of American families is the free enterprise system. The free market naturally and ceaselessly excels in creating opportunities and prosperity for families in ways that empower them. Government 'family support' programs, on which we spend \$1.2 trillion per year, are inherently inefficient, one-size-fits all, and constantly having to adjust and expand in attempt to meet families' needs.

Rachel Greszler

Research Fellow in Economics, Budget, and Entitlements
The Heritage Foundation

Clarence Carter

Director of the Office of Family Assistance

Acting Director of the Office of Community Services, Administration for Children & Families Department of Health & Human Services

Joel Griffith

Research Fellow, Financial Regulations

The Heritage Foundation

4:00-4:15 p.m. BREAK

4:15 – 5:15 p.m.

### **EMERGING ISSUE #3:**

#### REFRAMING THE FUTURE OF HIGHER EDUCATION

Today's higher education system is in crisis. American students are \$1.6 trillion in student loan debt, the majority of students will not finish college in four years, and many drop out without a degree and struggling to pay off debt. Unfortunately, policies from Washington make these problems worse. While many claim that "free" college is the answer, this will only shift the present problems with higher education onto American taxpayers. Only by encouraging competition and innovation in the higher education sector, and reducing funds coming from Washington, can we see true improvements for students and taxpayers.

#### Mike Howell

Executive Branch Advisor, Government Relations
The Heritage Foundation

Angela Sailor

Vice President, Feulner Institute
The Heritage Foundation

Mary Clare Amselem

Policy Analyst, Center for Education Policy

The Heritage Foundation

5:15-5:30 p.m.

#### REACH A BUDGET DEAL

Participants will reach a deal by this time in the trip. The Leader will read the budget resolution aloud to the body.

5:30-6:30 p.m.

### RECEPTION

6:30 - 8:30 p.m.

### DINNER AND KEYNOTE ADDRESS:

#### LEADERSHIP LESSONS FROM THE THUNDERBIRDS

Effective leaders seek to build commitment, trust, and loyalty with their teammates, whether that is in the field or in the workplace. JV Venable discusses lessons learned from serving for 25 years in the US Air Force. JV, who served as Commander of the celebrated Thunderbirds, also authored a book on leading high performance teams.

John "JV" Venable Col USAF (ret.)

Former Commander, USAF Thunderbirds Senior Research Fellow for Defense Policy

The Heritage Foundation

### FRIDAY, OCTOBER 11, 2019

8:30 a.m. (or after) Luggage Drop-off

Attendees leave their luggage at the Heritage luggage check

9:00 – 10:15 a.m. Breakfast Address & Emerging Issue #4:

WHAT AMERICANS WANT IN HEALTH CARE

Healthcare has become one of the defining issues of our current debate. Now more than ever, policy proposals such as single-payer universal care, eliminating public options, and privatized care, are drastically different from one another and from the status quo. This panel will review the current state of America's healthcare system and discuss solutions that have been prescribed to fix many of the problems arising from this system, ultimately addressing the question: What do Americans really want in health care?

Tara O'Neill Hayes

Deputy Director of Health Care Policy

American Action Forum

Nina Schaefer

Senior Research Fellow, Health Policy

The Heritage Foundation

Matt Eagan

Program Associate, Congressional Relations

The Heritage Foundation

10:15 – 10:30 a.m. **Break** 

10:30 - 10:45 a.m. FINAL VOTES

Participants will vote on the budget resolution.

10:45 – 11:00 a.m. **LOAD BUS** 

11:00 - 11:15 a.m. WALK TO USCGC TANEY

11:15 a.m. - 1:00 p.m. TOUR & DISCUSSION AT USCGC TANEY

The United States Coast Guard Cutter Taney is the last warship still afloat that fought in the attack on Pearl Harbor. The USCGC Taney offers tours of the vessel, after which participants will learn about the historical and military context of the attack on Pearl Harbor in relation to

military readiness today.

Dakota Wood

LtCol USMC (ret.)

Research Fellow, Defense Programs

The Heritage Foundation

1:00 p.m. – 1:15 p.m. **CLOSING REMARKS** 

Tommy thanks participants for attending this year's conference.

**Tommy Binion** 

Vice President, Government Relations

The Heritage Foundation

1:15 p.m. CONFERENCE CONCLUDES

Attendees board buses; boxed lunches provided on board

1:15 p.m. Bus departs

2:30 p.m. Bus arrives at The Heritage Foundation